# Certified Enroller Portal Search Training Guide

Overview

Covered California Certified Insurance Agents and Certified Enrollers (Certified Enrollment Counselors and Certified Application Counselors) who want to look up their delegated consumers can search for them within their portal. Search fields (filters) can be used to get a shorter, customized list for work on a specific customer set. See the tips below to use the search functionality effectively.
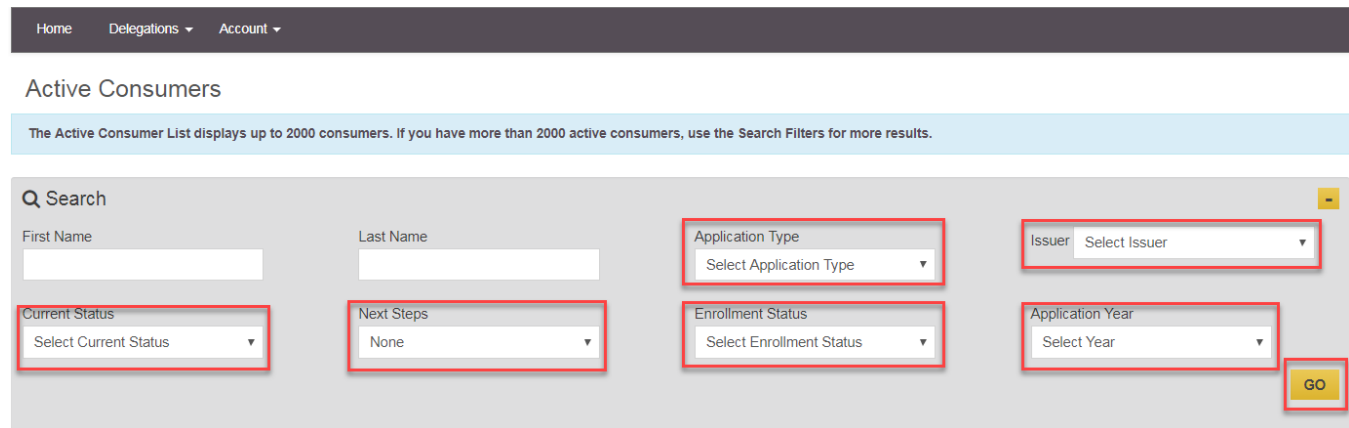
Steps

1. At the portal Home page, select **Delegations**, then **Active Consumers.**
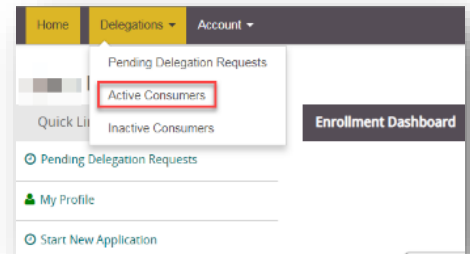
2. From the **Active Consumer** page, click ➕ to see the search filters.
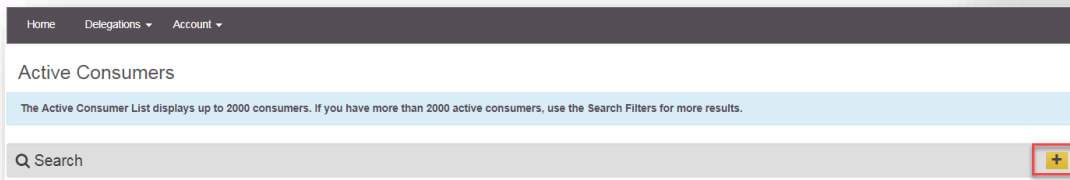
3. Enter your search criteria using the filters shown. Select **Go** to see results.

Tips

- Filters <u>reduce</u> the number of matches in your search results, creating a list of consumers with the same criteria.
  - Example: If you use the "First Name" filter and type in "Jo", consumers named Joe, John or Johnny display. Unless the consumer's first name begins with the letters "Jo", they will not display.
- Type in the first letter of a name and get all consumers that have that first initial. Search is NOT case sensitive.
  - Example: Type "j" in the First Name field and get results such as Jay, John, Julia, etc.
- The more filters you use, the shorter your search results.
  - Example: If you search for consumer John, use the field "Insurer", and choose Kaiser, only consumers named John (or similar) AND who chose Kaiser will show up.
- If you use too many filters, or filters that are not compatible, it is possible to have no results show up.

○ Example: Choosing "Case Inactive" for Current Status and "Pending" in Enrollment Status will not produce any results.

Search Results Options

See consumer's application

Removes your delegation

Current Status Search Filter

Filter search results based on application or case status.

Application Not Started	Consumer has created an account and has delegated it, but application was not begun.
Application In Progress	New application was started, but was not submitted.
Application Withdrawn	Application is no longer active and was withdrawn. The application was never completed (i.e. eligibility was not determined). If this is the first application ever, then no case will be created.
Case Inactive	Case has no active enrollments. An application was submitted at one point.
Renewal Opt Out	A SCR has opted the case out of automatic renewals on behalf of the consumer.

Next Steps Search Filter

Filter search results based on action needed.

None	Default option - No filter
ROP Expiring	Reasonable Opportunity Period (ROP) refers to the 95 days that consumers have to provide required documentation to clear their "conditional eligibility" status.
Complete Report a Change	A Report a Change was started and needs to be submitted to determine eligibility.
Complete Plan Selection	Consumer needs to choose a health plan or choose/opt out of a dental plan. This may happen for a new application or during a Report a Change process.
Complete Renewal	Consumer will be a part of the auto-renewals. Combine "Complete Renewal" with the Enrollment Status filter of "Pending" to see cases that will not be auto-enrolled and will need to actively renew.